C4722-2A

- TCI sets Chicago deals
- HBO shifts to local ad focus
- Down to the wire in Sacramento
- Industry execs tout cable prospects

CableVision

The news and features weekly of the cable television industry

December 31, 1984

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CONGRESSIONAL INFO SERVICE
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AD SALES AND THE ELUSIVE MAJOR MARKETS

Tom Sassos
Cable Networks Inc.

Leading the week 9-13

Chicago terms

Tele-Communications Inc.'s Communications of Chicago is awaiting approval from Chicago's City Council and Mayor Harold Washington of terms for Franchise Area I that would be more favorable than those in the city's other four franchise areas. If approved, city officials say many of the terms would be offered to the city's other franchisees, two of which TCI also has an interest in.

HBO goes local

Home Box Office will move toward a more localized promotional effort in its 1985 advertising campaign and will use a subscriber acquisition strategy instead of focusing on changing consumer attitudes, according to Matt Blank, HBO senior vice president of consumer marketing.

Sacramento delays

The future of Sacramento's cable franchise hangs in the balance as Cablevision of Sacramento faces contract deadlines and funding dilemmas. Charles Dolan, 47.5 percent owner of the system, has not yet raised the $34 million in equity required by his partnership agreement with Scripps-Howard Cable Co., also a 47.5 percent owner. Both parties are exploring "alternatives."

FCC adopts 12

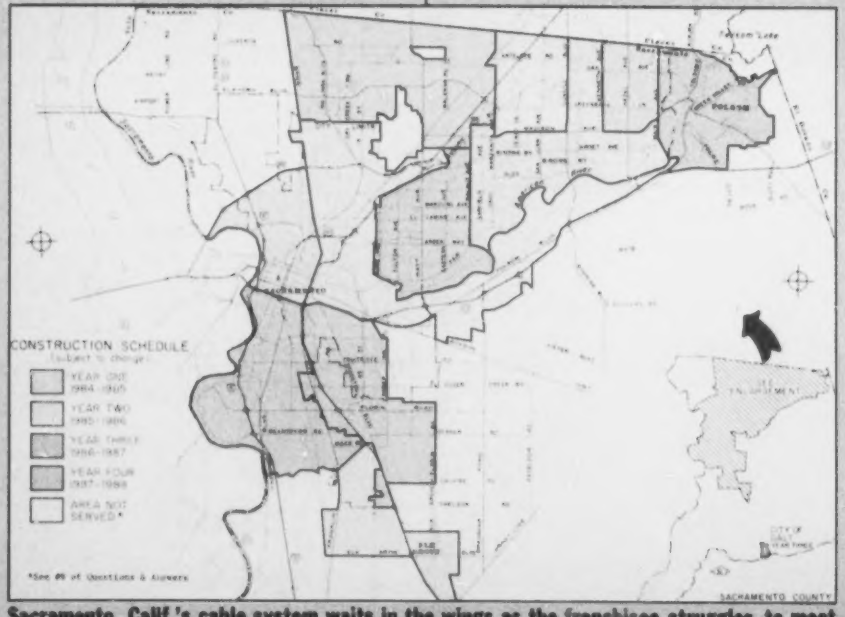
The Federal Communications Commission has adopted a plan by which television owners may purchase up to 12 television stations, providing the combined audience reach of the outlets does not exceed 25 percent of the total U.S. television households. The decision also included provisions permitting owners represented by a majority minority interest to own up to 14 stations if not more than 30 percent of U.S. television households are covered.

Nick's new feed

Nickelodeon will inaugurate a separate programming feed for its Pacific time zone affiliates on Jan. 1 following an agreement between Nickelodeon's parent, MTV Networks, and RCA Americom for the leasing of a transponder for the service.

NY area to link up

Cable Networks Inc. parent 3M Co. will start operating the Metropolitan Transmission Center, a microwave interconnect linking New York area systems, sometime next February.



Sacramento, Calif.'s cable system waits in the wings as the franchisee struggles to meet deadlines and funding requirements.

Sections

Business 26

"The future never looked better" and "the golden age of cable television is about to arrive" were two of the optimistic comments made by cable industry executives during a recent "Outlook on the Media" conference sponsored by Paine Webber and held in New York. Financial analysts and other audience members were given a bright picture of cable's present state and future prospects, especially in light of the recently passed cable legislation. Associate Editor Cecilia Capuzzi reports.

LARRY BARNS

About the cover

Cable Networks Inc. Vice President and General Manager Tom Sassos stands by the headend for CNI's microwave interconnect to be used to provide services for the company's New York soft interconnect. See stories in *PLUS*, pages 20-25, and *Leading the Week*, pages 9-13. Photography by Larry Barns.

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Ad sales & interconnects

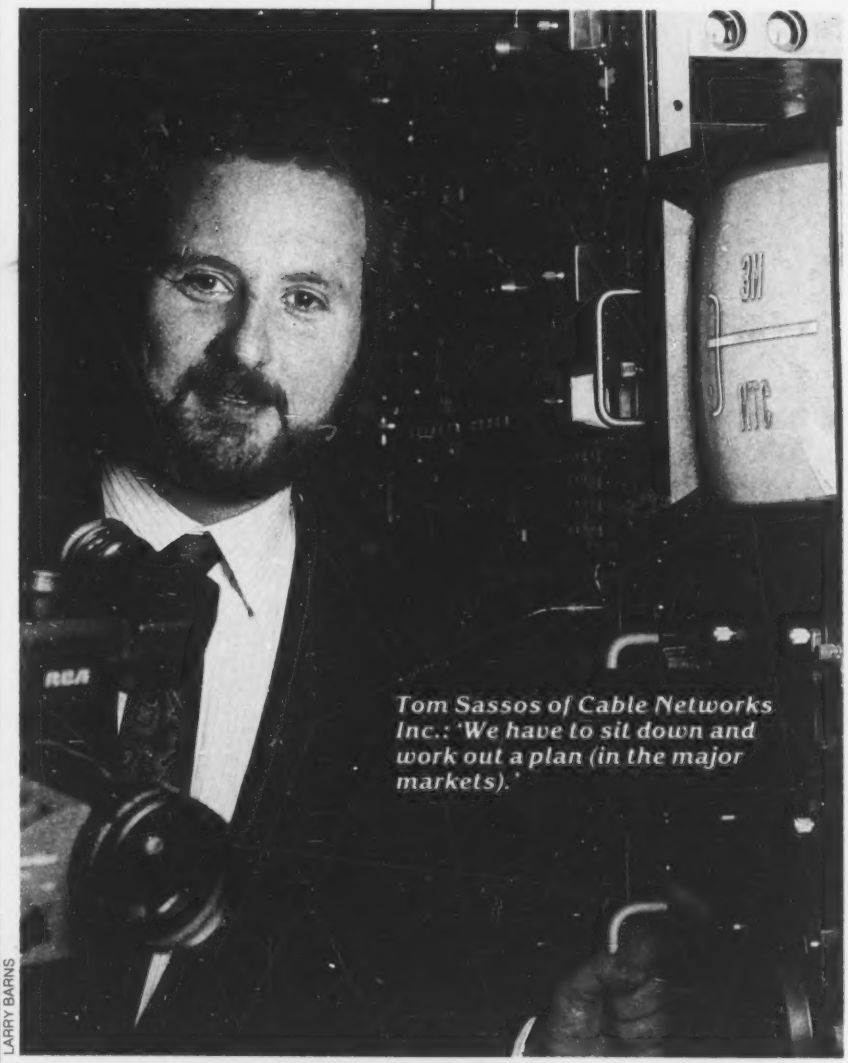
Getting the gravy train on track

According to one national rep firm, by concentrating its efforts in the top 20 markets, it will better its chances of cashing in on the long-awaited advertising potential of cable television.

By Cecilia Capuzzi

Cable is an ideal medium for spot television advertising. It's ability to target specific demographic groups and geographic areas makes it efficient for advertisers, especially local and regional advertisers, looking for ways to get around the waste that often results from broadcast buys.

But the cable advertising sales business has yet to get completely on track. To achieve its potential, many experts warn, system operators must make changes in approach and self-perception—and overcome their general reluctance to interconnect and cooperate with each other on a regional level.



Tom Sassos of Cable Networks Inc.: 'We have to sit down and work out a plan (in the major markets).'

LARRY BARNS

Cable's ad sales climate, slowly changing over the past several years, has reached a certain degree of maturity. As Bob Williams, president of New England Cable Rep pointed out, operators in a growing number of markets are realizing that if they unite their ad sales efforts with other operators in the same market, they can become significant national advertising entities.

That day is still a ways off, however. The cable industry has to overcome certain problems before it realizes its advertising potential, according to a sampling of cable reps. And reps, gearing up to position themselves as the means by which cable systems can realize at least their regional and national advertising potential, are closely examining the state of the industry and its rate of growth, before defining their actual role.

Cable Networks Inc., a national rep firm which is a subsidiary of the 3M Co., recently prepared a study to examine the state of cable advertising and the risks and benefits to its entry into the business.

Based on CNI's findings, Tom Sassos, CNI vice president and general manager, said the company had established three primary goals the industry must achieve if regional and national advertising efforts are to be successful: Systems in each of the top 20 to 25 markets must be interconnected; the cable industry must have access to quality local market research; and operators must develop and use standard affidavit and invoice forms to clean up the cable advertising "housekeeping" nightmare.

CNI's report states: "National spot sales will be a business only when markets are assembled," and this, while simply stated, is no simple task,

according to Sassos and others. The CNI report indicates that of the top 20 markets, only 10 are interconnected. Two of these, Chicago and San Francisco, are hard interconnects; the others are soft interconnects.

"One of the biggest problems is. . . (getting) the MSOs to sit down in the major markets. . . . But we have to sit down and work out a plan to determine how to structure these markets," Sassos said.

Williams agreed. He said it is important that systems be organized within a market if national advertising sales are to become a significant part of cable's business: "Most markets are not interconnected into a viable national marketplace," he said. "Operators have to get together with themselves first."

Cable operators' reluctance to team up in this business development area is the result of several factors. According to Sassos, operators within a marketplace fear that if they consolidate efforts with other systems in the region, one system will emerge as dominant, resulting in a loss of control over a potentially lucrative part of their business.

CNI's report outlines four other impediments to the growth of such interconnects.

- Operators fear losing control over their inventory and object to having to split with a third party profits from the sale of their avails.
- Operators also fear "lining another operator's pockets," as the report states.
- Operators actively involved in local ad sales do not see a need to "give inventory away to an interconnect."
- Many operators believe they can get higher rates from local retailers, according to the CNI report.

Wayne Bullock, president of Cable AdNet East, a local and regional rep firm located near Philadelphia, said system operators are "skeptical" about running advertising which is placed and often produced by a third party. Operators want to know 'Will (the ads) jeopardize my subscriber base? Are you going to be able to run those ads without turning off my subscribers?' " Bullock said. "Ninety-eight percent of their revenue is coming from subscribers. Their biggest concern is the quality (of the commercial) product and (the rep's) insertion capability."

When CNI first entered the cable ad sales arena, it had intended on building its power base through cable ad sales representation in key markets, according to the report. Key markets were defined as those that are "large in size," with at least 25 percent cable penetration and an "existing interconnect or good prospects for interconnection," the report stated.

The rationale, according to the report, was that this approach would lead to a "more intelligent growth," of the business and would give cable credibility in agency executives' eyes. Sales-call costs also would be kept in line.

CNI has since updated its strategy, the report states. It will also attempt representation in smaller markets around its sales offices in a "spoke strategy."

According to information in the report, concentrating efforts in the top 20 markets would appear to give the rep firm its best chance of hitting the largest percentage of spot business potential. Almost half (48 percent) of national spot billing is represented in these markets, and unless these markets are developed, the report states, "the business just won't grow."

The job of coordinating the top 20 markets, however, is more difficult than it appears to be. For example, as the CNI report states, "Even if the industry were to obtain the support of all of the top 15 MSOs, only 45 percent of the subscribers (in those markets) would be brought into the fold."

The report goes on to state that "even where interconnects are in place, a major piece of this market is missing." For example, in Chicago's interconnect the top 15 MSOs' share of subscribers represented in the interconnect is only 34 percent; in Atlanta it is only 5 percent. Coordinating these market interconnects will take more planning and more cooperation from a large and varied number of MSOs. In the meantime, as the report states, "There is nothing for CNI or any other company to sell in 10 of the top 20 markets."

CNI's updated "spoke" concept has served the company well. It recently entered into an agreement with American Television and

How big is the marketplace?

Annual dollar sales (in millions)

	1975	1979	1983	1984 Est.
Spot television				
National	$1,623	$2,873	$4,820	$5,300
Local	$1,334	$2,682	$4,285	$4,715
Total	$2,957	$5,555	$9,105	$10,015
Spot cable	—	—	$50	$80
Share of television			.5%	.8%
Basic Cable Share of Viewing (1st Half 1984)				**10-13%**

Source: FCC, Paul Kagan, A.C. Nielsen
Compiled by Cable Networks Inc. Research

Can markets be assembled into interconnects?

	National Spot Billings (in millions)	Cumulative (in millions)	% of Total
Markets 1-10	$1587.0	$1,587.0	33
11-20	$ 703.0	$2290.0	48
21-30	$ 415.0	$2705.0	56
31-40	$ 233.0	$2938.0	61
41-50	$ 193.0	$3131.0	65

Compiled by Cable Networks Inc. Research

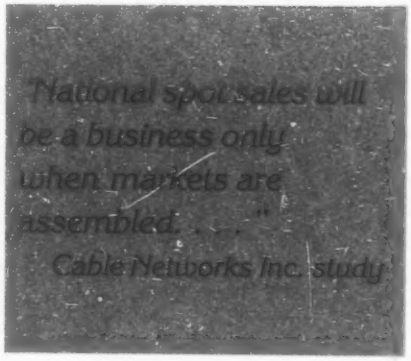
Communications in which it will represent all ATC systems in the markets where the rep firm has offices.

According to Larry Howe, ATC vice president, CNI has "learned a lot" in the past months. The rep firm, added Allan Eisenberg, ATC corporate manager of advertising sales, originally had a "top 25 market mentality," an approach that did not serve ATC well in the past since many of its systems were located outside of the top markets.

Both Howe and Eisenberg have come to view an interconnected market as essential for the viability of national advertising sales and see a rep firm playing a valuable part. They are less certain about what role a third party should play in coordinating local and regional ad sales. Commented Howe: "The role of a third party (in local and regional sales) in my guess. . . is not a long-term role. . . . Why do we need someone taking (revenue) off the top (of our profits)?. . . . That's their challenge. . . . They're up against systems in the market who can (interconnect) themselves. I can guarantee you I don't want anyone taking (local and regional sales) off our hands."

He added, however, that there is "clearly a role for the national rep" and that he is "deeply concerned that someone create that business."

In recognizing the future importance of interconnecting for ad sales, ATC has adopted a "clustering philosophy," according to Eisenberg. The MSO has been concentrating its acquisition efforts on the purchase of systems contiguous to its existing ones.



One aspect of the business of cable advertising sales is clear, however. Basic cable is not commanding the advertising rates or annual advertising dollars it should based on its share of the viewing market. According to CNI's report, "Basic cable has 10 to 13 percent of all viewing in 40 percent of the U.S. —or 4 or 5 percent of all national viewing." Despite cable's share it will receive only 0.85 percent of all spot television dollars in 1984, up from 0.5 percent in 1983. Or, as Howe sees it: "National advertisers are getting two times what they should be for the (rates they pay cable). They're demanding that discount and they're getting it because the market's undersold. . . . Once cable establishes its value the pricing will become more rationalized."

CNI in its report projects that by 1988, cable operators will receive their "fair share" of advertising revenue—8 percent of spot dollars, or $21.09 in revenue per subscriber, based on a 16 percent share of viewing. (This represents an annual growth rate of 75 percent, CNI reports.)

But for cable to command this "fair share," it must first create the cooperative environment that permits rates to rise to maximum levels. CNI believes cable advertising sales growth hinges on two major and some lesser issues. Using its New York interconnect and MTV as an example, the firm illustrates one of these problems in its report.

CNI's New York interconnect reaches 1 million subscribers, charges $300 for a 30-second MTV spot it has sold and takes 50 percent (or $150) for its commission. Viacom of Long Island, as one of the systems in the interconnect, would be entitled to 5 percent of the sale, or $7.50.

If Viacom sold a 30-second MTV spot itself to a local retailer, it would charge about $50. The commercial would reach 50,000 of its tiered subscribers; it would not have to share revenue from the sale with a third party or with other systems in the interconnect. To the extent that individual systems take advantage of these numbers advantages, CNI feels they can undermine the interconnect's ability to sell, with the net effect that interconnect rates remain depressed.

CNI states in the report that it cannot raise its rates for two reasons: "Local stations sell late night video shows with total market coverage and 2 to 4 ratings for $600 and $700. We have no ratings and only 1/6 of the market; MTV is selling its national inventory based on its

The fragmentation is a major factor

Existing interconnects	Rank	Market	Cable subs	% Penetration	Top 15 MSO share
S-H	1	New York	2186.5	33	46%
—	2	Los Angeles	1361.9	29	50%
H	3	Chicago	674.0	21	34%
S	4	Philadelphia	1019.4	40	41%
H	5	San Francisco	920.3	44	45%
S	6	Boston	726.5	34	43%
S	7	Detroit	488.1	25	42%
—	8	Washington	324.4	20	27%
½S	9	Dallas/Ft. Worth	528.5	32	50%
—	10	Cleveland	611.8	40	50%
S	11	Houston	592.2	39	44%
—	12	Pittsburgh	707.7	58	51%
—	13	Miami	472.0	43	21%
S	14	Seattle	569.9	46	68%
—	15	Minneapolis	195.9	17	38%
S	16	Atlanta	418.2	36	5%
—	17	Tampa/St. Pete	455.7	38	69%
—	18	St. Louis	345.6	31	48%
—	19	Denver	325.2	32	44%
—	20	Sacramento	279.3	30	33%

Source: Cable Networks Inc. Research

universe of over 20 million households for as low as $500."

The other issue is what Sassos termed "housekeeping." According to Williams of New England Cable Rep, it is the "number one current industry problem." Williams, who said national sales is the fastest growing part of his business (representing more than half), said the rep industry is doing its job "almost too well." "We're generating a level of business we're having trouble executing," he said.

The industry has yet to devise an efficient or standardized means of scheduling spots, ascertaining that they have run and billing the advertiser. Williams said he loses between 20 percent and 25 percent of his business because of missed spots or inaccurate billing. Sassos estimated CNI's losses to be 11 percent.

Cable's solution to the problem will be a part of what Williams called the cable ad sales industry's "evolving professionalism." Right now agencies and advertisers question cable's credibility and capability in executing ad sales orders, according to Williams and Sassos.

"When we do sell schedules they often do not run correctly. . . . Billing is (often) untimely and the schedules have been inappropriately run. . . . It discourages advertisers," Williams said. "There's nothing we can do other than to try and educate the system about how important it is to do this stuff right and fulfill their responsibility. The moment the system (agrees to run the spot), the responsibility of the sale shifts to the system. If they fall down it's almost better if we didn't sell it," Williams said.

A good portion of New England Cable Rep's sales are from large advertisers, such as department store chains, which advertise in rural C&D counties, according to Williams. In these areas systems are smaller and usually not well equipped to handle spot load.

"The systems that come in contact with some of the most sophisticated advertisers are often the least sophisticated systems," Williams said. "This exaggerates the problem."

In addition to the rate and scheduling problems the industry is in need of solid local market research, according to the reps interviewed. The research issue, however, although a concern, is not of primary importance to most operators, Sassos said. For that reason, he said he believes CNI or other rep firms have to spearhead its development: "We're the ones dealing with the sales," he said.

According to CNI's report, broadcast television has several advantages blocking cable's ability to compete with broadcast for national ad dollars. It is in these areas that CNI and Sassos believe the industry could most benefit from an interconnect and from the services of an outside rep. The broadcast advantages cited by CNI include the following:

- Broadcast television has 24-hour insertion capability, while only 10 percent of cable systems insert commercials.
- Broadcast network affiliates cover the whole market; cable system franchises fragment a market.
- Broadcast networks promote themselves and their programming; cable does little self-promotion.
- Broadcast has a timely, efficient billing/trafficking system; cable reps lose significant revenue due to errors in scheduling and billing.
- Broadcast television is an accepted and known quantity; cable is new and acceptance will be gradual.

According to the CNI report, an interconnect answers most of the problems raised above by allowing 24-hour insertion capability, better market coverage and cross-promotion capability through insertion on unused network avails. In addition, the CNI report states that "allocating some inventory to a regional or national interconnect is a prudent business decision." CNI lists three reasons:

- Systems will never sell out of all their local inventory. There is a very limited market within a franchise.
- Allocating a percentage of the major satellite services inventory to interconnects would increase demand on total inventory and increase pricing to local retailers.
- Dollars from an interconnect to a system are very high margin dollars.

Taking the interconnect business a step further, CNI expects to launch a hard interconnect unifying cable operators in the New York ADI sometime in January. Planning for the interconnect has taken into consideration local operators' needs to develop local sales efforts that can "coexist with (CNI's) regional and national efforts," according to Sassos.

The equipment, which includes a specially designed switch allows local insertion capability, a feature other hard interconnects have not been able to incorporate. CNI's New York interconnect is also expected to allow advertisers the option to buy any of four regions in the ADI: Long Island, West Chester, New Jersey and New York City. Hard interconnects have traditionally allowed advertisers to purchase only the entire interconnected region, a situation many advertisers and operators have balked at. Sassos said CNI is ultimately looking to offer advertisers the ability to buy individual or groups of systems within a hard interconnect. These features are meant to create the flexibility of a soft interconnect with the efficiencies of the hard interconnect.

Operators have shunned hard interconnects also because of the expense involved in the building and equipment. Reps generally propose to fund the set-up by taking a larger cut of the ad sales profits. Sassos said CNI will continue to take a 50 percent commission and look to increased sales to cover the expenses.

Williams, who said he is not a fan of hard interconnects, said he envisions a time when there will be "*intra*connects," which would be soft networks, with certain cable systems in the region hard wired together.

Despite the current problems, CNI believes the industry can effectively develop its regional and national ad sales efforts by focusing on a few areas. CNI will continue to "concentrate its efforts on the top 20 or 25 markets," as it pursues its spoken strategy, targeting 65 percent of the subscribers in those markets. In addition, the rep firm will "begin with soft interconnects, but lay the groundwork for hard interconnects." It will assist in standardizing affidavit and invoice forms, provide "as much selling ammunition as possible" and give the whole process time to gel.

As Williams operators said, "The solution is not one in the sky, but in front of your nose." He suggests cable operators "function professionally," and realize that their "destinies are within their own control."■

Cable services subscriber count

Satellite-fed national services

Basic services	Affiliates	Subscribers	% change in subs from 12/19/83*
American Christian Television Systems (ACTS)	136	2,063,652	
Arts & Entertainment	190	12,000,000	
Black Entertainment Television (BET)	388	7,700,000	+ 43.3
Cable News Network (CNN)	6,727	30,564,000	+ 35.0
CNN Headline News	2,002	13,584,000	+ 74.3
C-SPAN	1,800	20,000,000	+ 37.9
CBN Cable Network	4,887	27,168,000	+ 18.0
Country Music Television	165	4,200,000	
Entertainment & Sports Programming Network (ESPN)	9,200	34,000,000	+ 19.2
Eternal Word Television Network(EWTN)	204	2,600,000	+ 59.7
Financial News Network (FNN)	1,050	17,500,000	+ 45.8
The Learning Channel	615	5,231,138	+ 36.7
Lifetime	2,100	22,500,000	
Modern Satellite Network (MSN)	536	10,336,000	+ 19.6
Music Television (MTV)	2,700	24,200,000	+ 61.3
The Nashville Network	2,250	19,500,000	+ 95.0
National Christian Network (NCN)	91	1,167,728	– 18.8
National Jewish Television (NJTV)	228	5,196,000	+ 83.9
Nickelodeon	3,700	23,000,000	+ 64.8
Pacific Cable	NA	NA	
Prime of Life	NA	7,500,000	
PTL The Inspirational Network	1,080	13,000,000	+ 62.5
Santa Fe Communications	26	524,723	
Satellite Program Network (SPN)	525	11,500,000	+ 31.5
Silent Network	NA	NA	
SIN Television Network	276	28,338,300	+ 775.3
Trinity Broadcast Network	395	5,007,000	+ 49.4
USA Network	4,100	28,200,000	+ 41.0
The Weather Channel	1,436	15,700,000	+ 57.0
Video Hits One	NA	3,000,000	
WGN-TV	6,128	14,746,477	+ 34.6
WOR-TV	1,189	4,980,908	+ 18.5
WPIX-TV	152	885,000	
WTBS-TV	8,290	33,111,000	+ 19.7
Pay services			
Bravo	132	109,000	– 24.8
Cinemax	2,100	2,700,000	+ 8.0
The Disney Channel	2,000	1,500,000	+ 181.9
GalaVision	230	160,000	+ 28.0
Home Box Office (HBO)	5,400	13,500,000	+ 8.0
Home Theater Network (HTN)	400	300,000	+ 30.4
The Movie Channel	2,900	3,200,000	+ 28.0
The Playboy Channel	516	762,000	+ 37.0
The Pleasure Channel	NA	NA	
The Rainbow Service (American Movie Classics + Bravo)	70	192,000	
Showtime	3,200	5,400,000	+ 16.6
Audio services			
Lifestyle	99	2,613,129	+ 4.5
Moody Bible Institute	42	563,578	+ 52.4
Satellite Jazz Network	13	768,000	
Satellite Radio Network	50	403,000	
SCAN	34	218,569	+ 82.1
Star Ship Stereo	1	100	
WFMT, Chicago	160	1,005,858	+ 23.3
Text services			
AP News Cable	375	4,300,000	– 12.2
AP News Plus	NA	NA	
Cable Sportstracker	3	250,000	
Dow Jones Cable News	184	2,455,000	+ 44.4
Electronic Program Guide (EPG)	220	4,303,318	+ 89.1
Genesis Storytime	17	510,000	
Reuters News View	355	3,630,000	
UPI Data Cable	950	NA	
Gateway	NA	NA	
Pay-per-view services			
HiLife Channel	NA	NA	

Non-satellite-fed national services

Bicycled services		
Fuji Network	7	4,501
Nippon Golden Network	5	8,105
The Pleasure Channel	NA	NA
Vector Consumer News	13	350,000
Vector Consumer Shopping Guide	17	550,000

Regional entertainment services

Basic services	Affiliates	Subscribers
Atlanta Interfaith	7	131,000
Bay Area Religious Channel (BARC)	6	113,400
Buffalo Sabres Hockey	8	400,000
The Ecumenical Channel	7	140,000
KTVT	NA	NA
Life Newsvision	24	35,000
Madison Square Garden	56	1,800,000
Meadows Racing Network	50	420,000
MetroChannel	1	117,000
Newsday Cable	1	233,000
Sports Time	48	1,000,000
Texas Cable Network	12	730,000
Pay services		
Home Sports Entertainment—Houston/Dallas	68	100,000
Home Team Sports	22	48,000
New England Sports Network	52	21,358
PRISM-Philadelphia	88	370,000
Pro-Am Sports	40	29,500
The Superchannel	13	NA
SportsChannel (New England)	53	70,000
SportsChannel (New York)	43	394,000
Sports Time	127	45,000
SportsVision	22	97,000
Sportsvue Cable Network	25	17,000
Z-Channel	23	93,355

Announced services

Regional services	Expected Launch
Box Seat	2nd quarter 1985
Satellite-fed services	
Almi Group Network	TBA
The Aloha Network	TBA
Apollo Entertainment Television	TBA
The BuenaVision Channel	TBA
The CableShop	3rd quarter 1985
Cabletix	TBA
Comedy Entertainment Network	TBA
The Discovery Channel	4/85
Discovery Computer Network	2/85
Discovery Music Network	2/85
International Business Network	3/85
Kidvid Network	TBA
Magicable	TBA
Movie Time	4/85
The Nostalgia Channel	TBA
Odyessy	1/85
Satellite Concert Network	TBA
Sta. Video Music	TBA
Studioline	4/85
The Work Channel	TBA
X Press	1st quarter 1985

Note: Figures for affiliate and subscriber counts will be updated quarterly unless information is provided by the service. Send information to: CableVision Magazine, Attention Cable Stats, P.O. Box 5208-T A. 80217.
NA denotes not available
NC denotes no change
TBA denotes to be announced

* Percentage change is now computed using previous year's figures.
Source: Subscriber and affiliate counts are provided by the program service for International Thomson Communications Inc.

National cable advertising

This chart lists national advertisers on the basic cable network during December 1984.

A&E
British Airways (N)
Celestial Seasonings (N)
Exxon (R)
Ford (R)
GM (N)
IBM (R)
Kal Kan (N)
Kodak (N)
Polaroid (N)
RCA (R)
Schwepp's (N)
Showtime (R)

BET
Anheuser-Busch (R)
AT&T (R)
Avon (R)
Campbell's Soup (R)
Carson Products (R)
Coca-Cola (R)
Eastman Kodak (R)
Ford Motor Co. (R)
Hersey (R)
Home Box Office (R)
IBM (R)
J.C. Penney Co. (R)
Johnson & Johnson (R)
Kraft (R)
Mobil Oil (R)
Nike (R)
Orion Pictures (N)
Pepsi-Cola (R)
Procter & Gamble (R)
Quaker Oats (R)
San Inc. (N)
Sears (R)
Showtime/TMC (R)
Thompson Medical (R)
Universal Pictures (R)
U.S. Army (R)
U.S. Marines (R)
U.S. Postal Service (R)
U.S. Treasury Dept. (R)
Westinghouse (R)
Wrigley's (R)

CBN†
Bible Games Inc.
Black & Decker
Campbell's Soup
CBS Records
Chevrolet Truck Division
Clorox
General Foods
General Mills
Haines
Jeffrey Martin
J.G. Durand
Kimberly Clark
M&Ms/Mars
Nabisco
Richardson Vicks
Thompson Medical
Time Inc./Time-Life Books
USA Today

C-SPAN*
AT&T (R)
Centel (R)
DuPont (R)
General Motors (N)
IBM (R)
M/A-COM (N)

Dow Jones Cable News
Charles Schwab & Co. (R)
Consumer Report (R)
Forbes Stock Guide (N)
House & Garden Magazine (R)
Jack Anderson's Washington Letter (N)
Northwestern Mutual (N)
Pavarotti (N)
Smithsonian Magazine (R)

ESPN
AT&T (R)
Avis (R)
Canon Cameras (N)
DeBeer's (N)
Dodge (R)
Dr. School (N)
Esquire (R)
Gillette (R)
Guest Quarters (N)
HBO (R)
Hitachi (R)
Kawasaki (R)
Leaf Confectionary (N)
Menley & James (N)
Moet (N)
Nautilus Sports/Medical Industries Inc. (N)
New World Pictures (N)
Nikon (R)
Nissan (R)
Orion Pictures (N)
Paine Weber (R)
Paramount Pictures (N)
Polaroid (N)
Sports Illustrated (R)
Subaru (R)
U.S. Navy (R)

FNN
Allstate Insurance (N)
American Airlines (R)
American National/Cellular Telephone (N)
Apple (N)
AT&T (N)
Avis (R)
Barron's (R)
BMW (R)
Business Week (R)
Capital Preservation (R)
Charles Schwab (R)
Chicago Board of Trade (R)
Compaq Computers (N)
DHL Courier (R)
Epic/Real Estate (N)
Federal Stamp Reserve (R)
Ford/Autos (R)
Ford/Corporate (R)
GMAC (R)
Hayes Computers (N)
Heinold Commodities (N)
Hewlett Packard (N)
Hyatt Hotel (N)
Investment Rarities (N)
Italcable (R)
Kansas City Board of Trade (N)
Merrill Lynch (R)
Mita Copiers (R)
National Business Employment Weekly (R)
National Car Rental (N)
National Cash Register (N)
Oldsmobile (R)
Olympic Gold Coins (R)
Ramada Inns (R)
Rarities Mint (N)
Sanyo (N)
Sears Financial Network (R)
Security Pacific (R)
Shearson Lehman/ American Express (R)
Transamerica (N)
US Committee for Energy Awareness (N)
Wall Street Journal (R)

MSN
Anheuser-Busch (R)
Archway Cookies Inc. (R)
Ciba Pharmaceutical (R)
CONOCO, Inc. (R)
E.I. DuPont DeNemours & Co. (R)
General Foods (R)
General Mills (R)
Hershey Foods (R)
Mattel Inc. (R)
Mercedes Benz of North America (R)
Midcon Corp. (R)
NASA (R)
Park Row Publishers (R)
Phillip Morris Inc. (R)
Upjohn Inc. (R)
U.S. Army Corp. of Engineering (R)
U.S. Dept. of Transportation (R)
U.S. Olympic Committee (R)
Wrangler (R)

SPN
Air New Zealand (R)
Australian Tourist Bureau (N)
Chesebrough Ponds (R)
China Beer (N)
Hilton Inns (R)
Mennen (R)
Nikon (R)
Pacific Airlines (N)
Purina (N)
Rubbermaid (R)
Time/Life Books (R)
United Airlines (N)

The Learning Channel
Barron's Report (R)
Charles Schwab (R)
Malcolm E. Smith (N)
Scientific-Atlanta Magazine (R)
Sports Illustrated (R)
Wall Street Journal (R)

The Silent Network
Campbell's Soup (N)
Hallmark Cards (R)
Lloyd's Hearing Aids (R)
Magnastitch (R)
Solarts (R)

The Weather Channel
Black & Decker (R)
Campbell's Soup (N)
Carnation (N)
Celestial Seasonings (N)
Champion Spark Plugs (R)
Clorox (R)
Ford (R)
General Motors (R)
Intalcable (R)
Menley & James (N)
Michelin Tire Corp. (R)
Nabisco (N)
Panasonic (R)
Pillsbury (R)
Procter & Gamble (R)
Prudential-Bache (R)
Quaker Oats Co.(R)
Ralston Purina (R)
Richardson Vicks (R)
Ross Labs (N)
Sears Portrait (R)
Sears Roebuck (R)
Security Tire Chain (N)
STP (N)
Union Carbide (R)
United Airlines (R)
Warner Lambert (R)

R denotes renewal client
N denotes new client
*Listing is comprised of both advertisers and program underwriters
†New and renewal information not available.
Source: Advertising clients are provided by the programs services to International Thomson Communications Inc.